

IDA Guide to IHCDOnline

Registering in IHCDOnline	2
How to Find Your Organization Code (for returning organizations)	6
Submitting a Claim.....	8
Third Party (Match) Claims for IDA018 & Beyond:	12
Attaching Supporting Documentation:	13
Supporting Documentation Requirements:	16
Amending A Claim That You Have Already Submitted:	16
How to Add a New Match Holding Account to IHCDOnline	17

If at any point you run into an issue or challenge in IHCDOnline, please email claims@ihcda.in.gov. IHCD IDA program staff will most likely be unable to help.

Registering in IHCDOnline

First-time users will need to register for an account.

1. Go to online.ihcda.in.gov to access the website
2. Choose “Authority Online”



The screenshot shows the homepage of the Indiana Housing Online Management System. The header includes the IHCD logo and the title 'Indiana Housing Online Management System'. The main content area welcomes users and lists four options: Authority Online, DMS Online, ClientTrack, and Weatherization. A blue arrow points to the 'Authority Online' button.

ihcda Indiana Housing & Community Development Authority

Indiana Housing Online Management System

Welcome to Indiana Housing and Community Development Authority's online services.

This site allows our partners to access resources for managing their awards and meeting their reporting requirements.

[Authority Online](#)

[DMS Online](#)

[ClientTrack](#)

[Weatherization](#)

The Authority Online site is used for claims management, online applications, data management, and reporting.

The DMS Online site is for the new single family homeownership reservation system starting 8/31/2017.

ClientTrack is used for managing client information and reporting for HMIS.

The Weatherization Assistance Program site is used for Weatherization data and reporting.

3. First-time Users will have to click on the “New User? Register Here”



The screenshot shows the login page for the Authority DMS Online Management System. It includes a welcome message, a description of the site's purpose, and login fields for Username and Password. A blue arrow points to the 'New User? Register Here' link.

ihcda Indiana Housing & Community Development Authority

Indiana Housing Online Management System

Welcome to the Authority DMS Online Management System

This site will allow organizations working with the Indiana Housing and Community Development Authority to manage information about their awards. Some of the features of this site are claims management, Owner Certifications, IDA Awards, NAP Reporting, and the Single Family software download. This site continues to be expanded to allow our partners to work more closely with us and to streamline our processes. If you are having problems logging in or creating a profile please email claims@ihcda.in.gov

Username:

Password:

[New User? Register Here](#)

[Forgot Your Password?](#)

[Login](#)

4. Enter the Profile Information, including First Name and Last Name. Then enter your business email address and create a password. The default username will be your email, but you can change this if you wish only during the initial setup. **Once the username is established, it cannot be changed or reset.** User Passwords must be at least 7 characters and contain at least one number.

Registration

In order to gain access to this website, you must request it and

If your organization is already registered, please enter your organization or the HFA. This code will ensure that your registration

Profile Information

First Name:

Last Name:

E-mail: NOTE: It is recommended that new users use their business email address.

Username:

Password:

Confirm Password:

- Next, if your organization is already registered in IHCDOnline, enter its Organization Code. If you do not know your organization code, you can email claims@ihcda.in.gov and request it. Not having it will **not** keep you from establishing a profile but may delay your permissions request if the claims specialist does not know which organization to affiliate you with in our system.

Profile Information

First Name:

Last Name:

E-mail: NOTE: It is recommended that new users use their business email address.

Username:

Password:

If your organization is already registered, please enter your organization code which you can obtain from another user at your organization or the HFA. This code will ensure that your registration can be processed more quickly.

Enter Organization Code: **Load**

My Organization is not registered ☐

Organization Name:

- Once you have entered your code, please select the **Load** button. This will populate the information in the organization area based upon the Organization Code entered. Please verify the information is correct.

If your organization is already registered, please enter your organization code which you can obtain from another user at your organization or the HFA. This code will ensure that your registration can be processed more quickly.

Enter Organization Code: **Load**

My Organization is not registered ☐

7. If your organization has never used IHCDOnline before and is, therefore, not registered, please check the My Organization is not registered box.

Registration

In order to gain access to this website, you must request it and have it approved by the State. Please enter the following information:

If your organization is already registered, please enter your organization code which you can obtain from another user at your organization or the HFA. This code will ensure that your registration can be processed more quickly.

Profile Information

First Name:

Last Name:

E-mail: NOTE: It is recommended that new users use their business email address.

Username:

Password:

Confirm Password:

If your organization is already registered, please enter your organization code which you can obtain from another user at your organization or the HFA. This code will ensure that your registration can be processed more quickly.

Enter Organization Code:

My Organization is not registered ☐

Organization

Name:

Address:

City:

State:

Zip Code:

Telephone:

Fax: (optional)

8. Enter your organization's information in the Organization Box below. This will also cause the Organization to be registered for future use

My Organization is not registered ☐

Organization

Name:

Address:

City:

State:

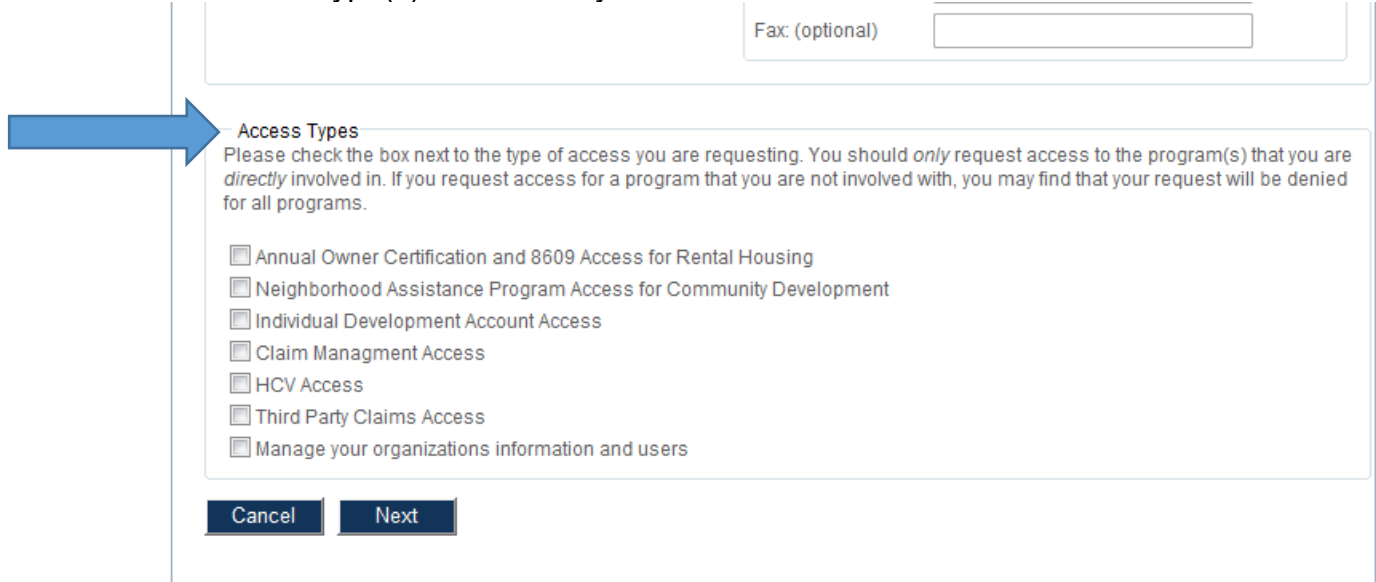
Zip Code:

Telephone:

Fax: (optional)

9. Select the Access Type needed by the user as described in Section 2 of this document; for IDA, choose Individual Development Account Access. Once you have made the appropriate selections, click the **Next** button. Your Organization

Administrator will review the requested access type and approve the specific access type(s) that best fit your needs.



Fax: (optional)

Access Types
Please check the box next to the type of access you are requesting. You should *only* request access to the program(s) that you are *directly* involved in. If you request access for a program that you are not involved with, you may find that your request will be denied for all programs.

- ☐ Annual Owner Certification and 8609 Access for Rental Housing
- ☐ Neighborhood Assistance Program Access for Community Development
- ☐ Individual Development Account Access
- ☐ Claim Management Access
- ☐ HCV Access
- ☐ Third Party Claims Access
- ☐ Manage your organizations information and users

10. Review the Registration Summary screen. Please verify all information on this screen is correct. Please note that if you cancel at this point, all information will be removed from the Registration Screen. If it is all correct, click the Submit button. You will then receive the following message at the bottom of the screen:

“Your registration information has been submitted and is being processed. An email notification will be sent to you upon approval or denial. Please be aware that your request may take up to 3 business days to be processed. ”


11. Click **Return** to exit this page.

12. After you have completed the New User registration, your Organization’s Administrator will receive an email indicating that you have requested permissions. **At this time, please email claims@ihcda.in.gov and request permissions from IHCD.** Once the Claims department receives your email, someone from that department will finalize your registration.

How to Find Your Organization Code (for returning organizations)

Returning organizations that need to register new Users can find their organization code by logging into IHCDAOnline.

1. Click on “My Profile” on the left. This screen may look different depending on the reports an agency submits and what individual staff have access to.



ihcda 
Indiana Housing & Community Development Authority

Welcome Veda Morris-May

Indiana Housing Online Management System

[Logout](#)
[Help](#)
17:45

My Profile 

Programs

IDA	Individual Development Account Administrators can manage their participants and programs through this site.
NAP	Neighborhood Assistance Program. This will allow awardees to enter their semi-annual reporting as well as apply for the NAP program during open rounds.
Award Claims Management	Claims Management will allow an Awardee to submit claims online for payment. This will work for the majority of the awards that use a claims process. You are able to submit claims for any award that your organization is the awardee as well as view the claim status.
Professional Services Claims Management	Claims Management will allow an Awardee to submit claims online for payment. This will work for the majority of the awards that use a claims process. You are able to submit claims for any award that your organization is the awardee as well as view the claim status.
My Profile	Manage your profile including your password, contact information, your organization information, and other information about your organization.

Many features of the Authority Online system are based your organization. In some cases, you may need to share your 'Organization Code' with another organization or with someone in your organization who is registering as a new user. This organization code can be found from your profile screen on the 'My Organization' page.

2. Choose “Information” under Organization on the left

Welcome Veda Morris-May

Indiana Housing Online Management System

Return To Programs Listing

Return

Profile

User Details

Request New Access

Change Organization

Organization

Information

Contacts

Password Reset

Current Password:

New Password:

Confirm Password:

Set Password

Profile Details

First Name: Veda

Last Name: Morris-May

Organization: IHCD

Organization Address: 30 South Meridian St Suite 1000

City: Indianapolis

State: IN

Zip Code: 46204

Telephone: (317) 232-7777

Fax: (optional) (317) 232-7778

E-mail: vmorrismay@ihcda.in.gov

Username: vmorrismay

Update

User Access

Neighborhood Assistance Program Access for Community Development

☒ NAP Viewers - Date Granted: 1/24/2018

☒ NAP Editors - Date Granted: 4/4/2018

Individual Development Account Access

☒ RIDA Administrators - Date Granted: 5/14/2018

☒ IDA Administrators - Date Granted: 5/14/2018

Claim Management Access

☒ Claims Management Submitter - Date Granted: 4/4/2018

☒ Claims Management Editors - Date Granted: 4/4/2018

☒ Claims Management Viewers - Date Granted: 4/4/2018

Third Party Claims Access

☐ - Third Party Claims

Manage your organizations information and users

☐ Organization Administrators

View organization information and request new permissions

☒ Organization Viewers - Date Granted: 1/24/2018

Online Application Access for Developers Only

☐ User Access Administration

☐ Online Application Editors

☐ Online Application Viewers

3. "Organization Code" will be found in the 'Physical Address' section

Welcome Veda Morris-May

Indiana Housing Online Management System

[Logout](#)

[Help](#)

18:58

Return To Programs Listing

Return

Profile

User Details

Request New Access

Change Organization

Organization

Information

Contacts

Organization Information

Physical Address

Organization Code: EBE778DEB0

Organization Type: Government - State

Organization Name: IHCD

Federal ID#:

Address 1: 30 S Meridian St

Address 2: ste 1000

City: Indianapolis

Zip: 46204

Date of Formation: / /

Organization Sub Type:

Parent Organization:

Duns#: 086870479

Primary Phone: (317) 232-7777

Primary Fax:


State: IN

County: MARION

MBE ☐ WBE ☐

Submitting a Claim

1. Select “Awards Claims Management” on the left side of the screen for access to the IDA program within IHCDOnline.



ihcda Indiana Housing & Community Development Authority

Welcome Veda Morris-May

Indiana Housing Online Management System

Logout Help 17:45

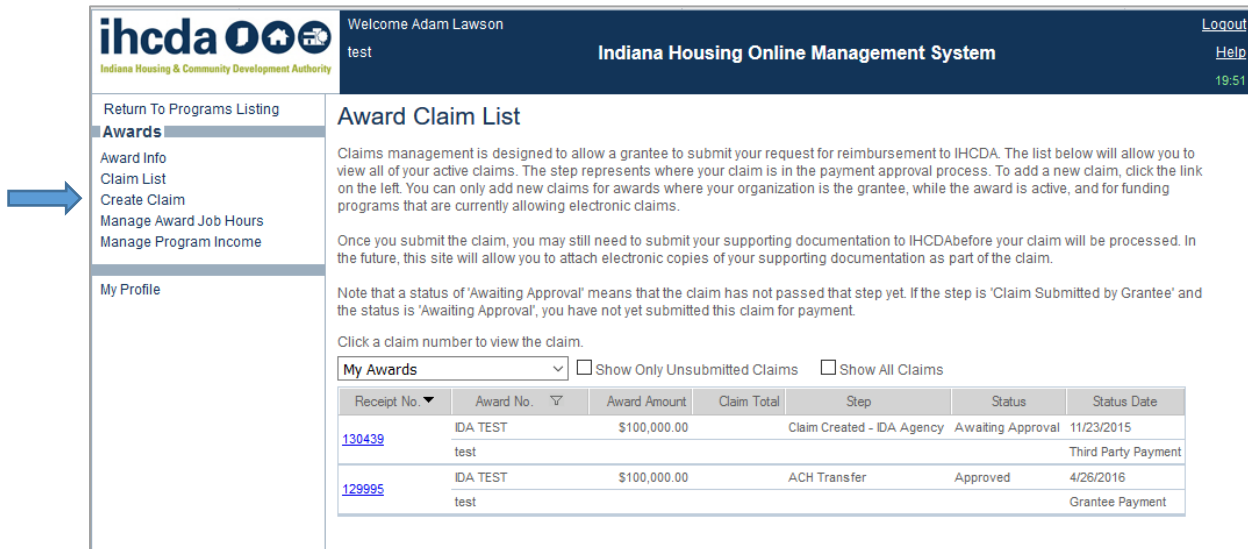
My Profile

Programs

- [IDA](#) Individual Development Account Administrators can manage their participants and programs through this site.
- [NAP](#) Neighborhood Assistance Program. This will allow awardees to enter their semi-annual reporting as well as apply for the NAP program during open rounds.
- [Award Claims Management](#) Claims Management will allow an Awardee to submit claims online for payment. This will work for the majority of the awards that use a claims process. You are able to submit claims for any award that your organization is the awardee as well as view the claim status.
- [Professional Services Claims Management](#) Claims Management will allow an Awardee to submit claims online for payment. This will work for the majority of the awards that use a claims process. You are able to submit claims for any award that your organization is the awardee as well as view the claim status.
- [My Profile](#) Manage your profile including your password, contact information, your organization information, and other information about your organization.

Many features of the Authority Online system are based your organization. In some cases, you may need to share your 'Organization Code' with another organization or with someone in your organization who is registering as a new user. This organization code can be found from your profile screen on the 'My Organization' page.

2. To create a new claim click on “create claim” in the left column



ihcda Indiana Housing & Community Development Authority

Welcome Adam Lawson

test

Indiana Housing Online Management System

Logout Help 19:51

[Return To Programs Listing](#)

Awards

- [Award Info](#)
- [Claim List](#)
- [Create Claim](#)
- [Manage Award Job Hours](#)
- [Manage Program Income](#)

My Profile

Award Claim List

Claims management is designed to allow a grantee to submit your request for reimbursement to IHCD. The list below will allow you to view all of your active claims. The step represents where your claim is in the payment approval process. To add a new claim, click the link on the left. You can only add new claims for awards where your organization is the grantee, while the award is active, and for funding programs that are currently allowing electronic claims.

Once you submit the claim, you may still need to submit your supporting documentation to IHCD before your claim will be processed. In the future, this site will allow you to attach electronic copies of your supporting documentation as part of the claim.

Note that a status of 'Awaiting Approval' means that the claim has not passed that step yet. If the step is 'Claim Submitted by Grantee' and the status is 'Awaiting Approval', you have not yet submitted this claim for payment.

Click a claim number to view the claim.

My Awards ☐ Show Only Unsubmitted Claims ☐ Show All Claims

Receipt No. ▼	Award No. ▼	Award Amount	Claim Total	Step	Status	Status Date
130439	IDA TEST	\$100,000.00		Claim Created - IDA Agency	Awaiting Approval	11/23/2015
	test				Third Party Payment	
129995	IDA TEST	\$100,000.00		ACH Transfer	Approved	4/26/2016
	test				Grantee Payment	

3. Use the first drop down to “Select the Award”. This will be the IDA award that you are wanting to claim from.

ihcda Indiana Housing & Community Development Authority

Welcome Test Person
test

Indiana Housing Online Management System

Logout
Help
19:50

Return To Programs Listing

Awards

Award Info
Claim List
Create Claim
Manage Award Job Hours
Manage Program Income

My Profile

Create Claim

To start a new claim, select the award from the list and click the button. If your award is not in the list, there could be a couple reasons. The most likely cause is that you have an existing claim that has not been submitted for payment. Verify this from the 'Claim List' screen. If you do not see an unsubmitted claim for your award in that list, then IHCD may not be currently allowing this award to be submitted electronically.

Select an Award **IDA TEST**

Select a Transaction Type

Create Claim

4. Use the second dropdown to “Select a Transaction Type”. For IDA, agencies should select one of the following:

ihcda Indiana Housing & Community Development Authority

Welcome Test Person
test

Indiana Housing Online Management System

Logout
Help
19:50

Return To Programs Listing

Awards

Award Info
Claim List
Create Claim
Manage Award Job Hours
Manage Program Income

My Profile

Create Claim

To start a new claim, select the award from the list and click the button. If your award is not in the list, there could be a couple reasons. The most likely cause is that you have an existing claim that has not been submitted for payment. Verify this from the 'Claim List' screen. If you do not see an unsubmitted claim for your award in that list, then IHCD may not be currently allowing this award to be submitted electronically.

Select an Award IDA TEST

Select a Transaction Type

Create Claim

Third Party Payment: A third party payment is a draw of funds that ***will be paid to an IDA Participant.***

Grantee Payment: A grantee payment is a standard draw of funds ***for the administration of the grantee's IDA award.***

Adjustment: An adjustment transaction allows an award grantee to make corrections to line items within an award. An adjustment will have both positive and negative line item amounts and must have a net total of zero. No funds are either drawn or paid as part of an adjustment transaction.

****ADJUSTMENT CLAIMS SHOULD NOT BE USED IN THE IDA AWARDS.**

You need to consult a Claims Review Specialist to discuss the filing of an adjustment claim. No adjustment claims will be approved without prior approval being given to grantee per IHCD staff. **

Return of Funds: Is a transaction to return funds back to IHCD. The organization will not be able to access those funds again, so ***ROF claims should only be used at the end of an award or if there are leftover funds from an IDA participant graduating.***

Repayment Claim: Is a *transaction to return funds back to IHCD that will go back into the award amount. These funds are able to be reused*, and are most common when an IDA participant either leaves the program or is reassigned to a new award.

5. When you have selected the appropriate award and transaction type you can hit “create claim”. The budget lines remain the same for all the claim types.

The screenshot displays the 'Create Claim' interface of the Indiana Housing Online Management System. The header includes the IHCD logo, user login details ('Welcome Test Person', 'test'), and system navigation links ('Logout', 'Help', '19:58'). The sidebar on the left contains a 'Return To Programs Listing' link and an 'Awards' section with sub-links: 'Award Info', 'Claim List', 'Create Claim', 'Manage Award Job Hours', and 'Manage Program Income'. The main content area, titled 'Create Claim', provides instructions on how to start a new claim. Below the instructions are two dropdown menus: 'Select an Award' (set to 'IDA TEST') and 'Select a Transaction Type' (set to 'Grantee Payment'). A red circle highlights the 'Create Claim' button, which is pointed to by a blue arrow from the right side of the page.

**** It is important to note that you may NOT have a claim that contains both administrative and match amounts. These are two different types of claims, as specified above in #4. ****

Grantee (Administrative) Claims IDA018 & Beyond:

You will enter the Administrative amount being claimed in the ADMIN line item. You may only enter the amount in the STATE line item provided for ADMIN.

Claim Details IDA TEST

The claims detail displays the information about the current claims for this award. You can see the budget breakdown for the award along with the remaining amount for each line item. Use the box for each line item to enter the amount you are claiming. If your award is not restricted by budgeted line items, you will see all available line items for your award. If your award requires claims against individual buildings, you will see a list of those buildings along with the line items associated with those buildings. Once you have entered your claim amounts, click the 'Save' button at the bottom of the page.

Claim Reference Number:

Award Remaining Budget: \$60,000.00

Award State

Remaining Budget: \$60,000.00

Line Item	Total Budget	Remaining Balance	Amount
Admin	\$10,000.00	\$10,000.00	<input type="text" value="0.00"/>
State Match	\$50,000.00	\$50,000.00	<input type="text" value="0.00"/>

Comments

Save

Third Party (Match) Claims for IDA018 & Beyond:

You will enter the MATCH amount being claimed in the STATE MATCH line item. You may only enter the amount in the STATE MATCH line item for a match claim. Then you will click SAVE.

[Summary](#) | [Claim](#) | [Claim Status](#) | [Supporting Documentation](#) | [Receivables](#)

Claim Details

IDA TEST

The claims detail displays the information about the current claims for this award. You can see the budget breakdown for the award along with the remaining amount for each line item. Use the box for each line item to enter the amount you are claiming. If your award is not restricted by budgeted line items, you will see all available line items for your award. If your award requires claims against individual buildings, you will see a list of those buildings along with the line items associated with those buildings. Once you have entered your claim amounts, click the 'Save' button at the bottom of the page.

Claim Reference Number:

Award Remaining Budget: \$60,000.00

Award State

Remaining Budget: \$60,000.00

Line Item	Total Budget	Remaining Balance	Amount
Admin	\$10,000.00	\$10,000.00	<input type="text" value="0.00"/>
State Match	\$50,000.00	\$50,000.00	<input type="text" value="0.00"/>

Comments

⬆

⬇

Save

Attaching Supporting Documentation:

See next section for information on type of supporting documentation.

1. To Attach supporting documentation for the claim click **“Supporting Documentation”** at the top.

Summary | Claim | Claim Status | **Supporting Documentation** | Receivables

Claim Details IDA TEST



The claims detail displays the information about the current claims for this award. You can see the budget breakdown for the award along with the remaining amount for each line item. Use the box for each line item to enter the amount you are claiming. If your award is not restricted by budgeted line items, you will see all available line items for your award. If your award requires claims against individual buildings, you will see a list of those buildings along with the line items associated with those buildings. Once you have entered your claim amounts, click the 'Save' button at the bottom of the page.

Claim Reference Number:

Award Remaining Budget: \$60,000.00

Award State

Remaining Budget: \$60,000.00

Line Item	Total Budget	Remaining Balance	Amount
Admin	\$10,000.00	\$10,000.00	<input type="text" value="0.00"/>
State Match	\$50,000.00	\$50,000.00	<input type="text" value="0.00"/>

2. You will choose **“Claims documentation”** for the Document type and click BROWSE to upload documentation from your files. Once you have the correct file selected you will click on SUBMIT DOCUMENT.

Summary | Claim | Claim Status | Supporting Documentation | Receivables

Supporting Documentation IDA TEST

Accepted File Extensions: tiff, tif, doc, docx, xls, xlsx, xml, jpeg, jpg, pdf, msg

Max File Size: 30720 KB

Document Type



Upload Document

☐ Required for Claim Submission

Submit Document

- Once you successfully upload files you will see them appear below the submit button. Please note that you cannot submit without attaching supporting documentation.

Summary | Claim | Claim Status | Supporting Documentation | Receivables

Supporting Documentation

IDA TEST

Accepted File Extensions: tiff, tif, doc, docx, xls, xlsx, xml, jpeg, jpg, pdf, msg

Max File Size: 30720 KB


Document Type Claims Documentation ▼

Upload Document Browse...


☒ Required for Claim Submission

Submit Document

	Document Name	Document Date
View	DO NOT PAY DO NOT PAY BLN PRE DEMO INSPECTION CLAIM	9/18/2019 1:03:28 PM



- After all documentation has been uploaded and the claim amounts have been entered and saved you will click on the **SUMMARY** tab at the top of the screen.



Summary | Claim | Claim Status | Supporting Documentation | Receivables

Claim Summary

IDA TEST

Claim Receipt: 224902

test

Transaction Type: Grantee Payment

Vendor:

The claims summary displays the information about previous and existing claims for this award. You can see the budget breakdown for the award, previous draws against line items, and the remaining amount for each line item. If your award is not restricted by budgeted line items, you will see all available line items for your award. If your award requires claims against individual buildings, you will see a list of those buildings along with the line items associated with those buildings. To modify the current claim, click on the 'Claim' link above.

Award Amount: \$60,000.00

State -

Line Item	Budget	Previous Claim	Current Claim	Total Claim	Balance to Claim	Previous ROF	Current ROF
Admin	\$10,000.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$0.00	\$0.00
State Match	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$0.00	\$0.00
Group Total	\$60,000.00	\$0.00	\$0.00	\$0.00	\$60,000.00	\$0.00	\$0.00

- You will verify the amounts are correct within this screen and then you will hit **SUBMIT CLAIM** in the bottom right-hand corner of the screen

Summary | Claim | Claim Status | Supporting Documentation | Receivables

Claim Summary
IDA TEST
Claim Receipt: 224902
test
Transaction Type: Grantee Payment
Vendor:

The claims summary displays the information about previous and existing claims for this award. You can see the budget breakdown for the award, previous draws against line items, and the remaining amount for each line item. If your award is not restricted by budgeted line items, you will see all available line items for your award. If your award requires claims against individual buildings, you will see a list of those buildings along with the line items associated with those buildings. To modify the current claim, click on the 'Claim' link above.

Award Amount: \$60,000.00

State -

Line Item	Budget	Previous Claim	Current Claim	Total Claim	Balance to Claim	Previous ROF	Current ROF
Admin	\$10,000.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$0.00	\$0.00
State Match	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$0.00	\$0.00
Group Total	\$60,000.00	\$0.00	\$0.00	\$0.00	\$60,000.00	\$0.00	\$0.00
Claimed Percentage					0%		

Totals

	Budget	Previous Claim	Current Claim	Total Claim	Balance to Claim	Previous ROF	Current ROF
Total - All Groups	\$60,000.00	\$0.00	\$0.00	\$0.00	\$60,000.00	\$0.00	\$0.00
Claimed Percentage					0%		

By pressing the button on this screen, I hereby certify that any information submitted into the Indiana Housing Online Management System by me is true, accurate, and complete. I understand that any information, documentation, etc., submitted by me is related to programs that are funded with federal and state funding sources, and any false claims, statements, documents, falsifications, or concealment of material fact(s), may be prosecuted under applicable federal and state laws and may result in criminal and/or civil penalties.

18 U.S.C. § 1001, "Fraud and False Statements," provides among other things, in any matter within the jurisdiction of the executive, legislative, or judicial branch of the Government of the United States, anyone who knowingly and willfully: (1) falsifies, conceals, or covers up by any trick, scheme, or device a material fact; (2) makes any materially false, fictitious, or fraudulent statement or representation; or (3) makes or uses any false writing or document knowing the same to contain any materially false, fictitious, or fraudulent statement or entry; shall be fined under this title, and/or imprisoned for not longer than five (5) years. I also understand that Authority Online usernames and passwords should not be shared. Please register for a username if you do not have your own.

[Delete Claim](#) [Submit Claim](#) [Print Receipt](#) [Claim Details Report](#)

Copyright © 2019, Authority DMS. All rights reserved.

NOTE: If you do not see the amounts displaying in this screen, this means that you did not click the SAVE button in the CLAIM screen and you will need to go back into that screen, re-enter the amounts and click save. You will then return to the SUMMARY screen and submit the claim .

If you would at any time like to check on the status of your claim as it is moving throughout the system, you can click on the CLAIM STATUS tab. There are four steps a claim can be in:

1. Claim Created – which means you have created the claim but the claim has NOT been submitted
2. IHCDA Program Administrator Review – means the claim has been submitted and is being reviewed.
3. Accounting Review – the claim has moved to Program accounting for review
4. ACH Transfer – the claim is being paid

ihcda 
 Indiana Housing & Community Development Authority

Welcome Adam Lawson
 test

Indiana Housing Online Management System

Return To Programs Listing

Awards

Award Info
 Claim List
 Create Claim
 Manage Award Job Hours
 Manage Program Income

My Profile

Summary | Claim | **Claim Status** | Supporting Documentation | Receivables

Claim Status
IDA TEST

This will allow you to follow the progress of your claim through the payment process. Below, you can see approval process toward payment. The current step is at the top of the list.

Step	Status	Step Date	User	Comment
Claim Created - IDA Agency	Awaiting Approval	5/31/2019 7:41:00 AM	Adam Lawson	

Supporting Documentation Requirements:

Grantee (Administrative) Payments must include the following:

1. Timesheets, general ledgers or revenue & expense reports for any IDA admin dollars that are being claimed
2. The receipts for any supplies related to the IDA program purchased.

Third Party (Match) Payments must include the following:

1. IHCDCA Match Claim Document (provided by IHCDCA)

Return of Funds Claims must include the following:

1. Account Closeout Form (provided by IHCDCA)

Repayment Claims must include the following:

1. Account Closeout Form (provided by IHCDCA)

Amending A Claim That You Have Already Submitted:

1. Contact IHCDCA at claims@ihcda.in.gov and request that the claim be denied.
2. Once the claim has been denied you will go back into the system, click on the claim, make the adjustments needed, click save and resubmit the claim.


How to Add a New Match Holding Account to IHCDOnline

Third Party Claims should be going into a HOLDING ACCOUNT that you have established at a bank, and not the account used for Administrative purposes. These claims are for Participant match claims.

This Account is a **HOLDING** account and should be established with the bank before you begin to process any type of claim within the IDA program.

To add Third Party/Match Holding banking Information in IHCDOnline, please do the following:

1. Go to <https://online.ihcda.in.gov> to access the website and log in.
2. Select the IDA



Programs	
Owner Certification	This will allow a property manager to complete their Owner Certifications for the RHTC, CDBG, HOME, and Development Fund programs.
Progress Report	This will allow the owner or developer to enter the Semi-Annual 8609 progress report.
Single Family Software Download	Single Family Participating Lenders can download the SFDMS software from here to manage their MRB, MCC, DPA, and MSP reservations.
HCV Reports	This will allow property owners to enter completion report and closeout information for their awards.
IDA	Individual Development Account Administrators can manage their participants and programs through this site.
NAP	Neighborhood Assistance Program. This will allow awardees to enter their semi-annual reporting as well as apply for the NAP program during open rounds.
Award Claims Management	Claims Management will allow an Awardee to submit claims online for payment. This will work for the majority of the awards that use a claims process. You are able to submit claims for any award that your organization is the awardee as well as view the claim status.
Professional Services Claims Management	Claims Management will allow an Awardee to submit claims online for payment. This will work for the majority of the awards that use a claims process. You are able to submit claims for any award that your organization is the awardee as well as view the claim status.
Third Party Claims Management	Third Party Claims Management will allow a third party organization to view their online claims for payment. Claims are submitted by the Awardee for direct payment to the third party organization.
Online Applications	Applicant organizations can submit an online application for any open rounds for programs.
My Organization	Manage the information about your organization such as contact information, users, partnerships, and partners.

3. Click on Banking Account Information

ihcda

Indiana Housing & Community Development Authority

Return To Programs Listing

Main

Claims Management

Award Information

Participant Information

Reports

Bank Account Information

Personal Savings Deposits

Training Entry Form

Manage Projects

Manage Traditional IDA

EDA Setup

Manage Incentives

My Profile

Welcome Test Person

Test

Indiana Housing Online Management System

Individual Development Account Management

This system is provided for IDA Administrators to manage their IDA Participants and associated IDA program information. Both IDA Administrators and IHCD staff have access to this information and can perform their management functions.

The menu at the left will allow you to navigate through the site. The main areas are described below.

- Award Information - this is where you maintain general information about your IDA awards.
- Participants - this is where you can access your IDA participants.
- Reports - these are the available pre-built IDA reports.
- Banks - this is where you maintain your list of banking partners.
- My Profile - this is where you can maintain your user information and change your password.
- Manage Users - this is where you can manage access to your IDA information for other users.

Case Follow Up:

There are no case notes due for follow up in the next 10 days.

4. Click on ADD NEW BANK

ihcda

Indiana Housing & Community Development Authority

Return To Programs Listing

Main

Claims Management

Award Information

Participant Information

Reports

Bank Account Information

Personal Savings Deposits

Training Entry Form

Manage Projects

Manage Traditional IDA

EDA Setup

Manage Incentives

My Profile

Welcome Test Person

Test

Indiana Housing Online Management System

Logout

Help

19:3

Bank Account Information

Edit

Bank Information

Show: ☒ Active ☐ Inactive ☐ Active and Inactive

Add New Bank

Name

Routing Number

City

Contact Name

Contact Email

Phone

Note: Some "Deactivate" buttons will remain disabled because the bank is being used by active accounts.

Account Information

5. Enter your banking information and routing number and click Save.

Bank Account Information

Bank Information Edit

Show: ☒ Active ☐ Inactive ☐ Active and Inactive

Add New Bank

Name	Routing Number	City	Contact Name	Contact Email	Phone
Note: Some "Deactivate" buttons will remain disabled because the bank is being used by active accounts.					

Add Bank

Name

Routing Number

Contact Name

Contact Email

Address

City

State

Zip

Phone Number

Cancel Save

6. Then you will click on **Add Account** in the bottom section of the screen and fill out your account number. You will select **Holding** as the account type, select IDA as the Program, select your bank and enter the account number. Then you will click save.

Account Information

Show: ☒ Active ☐ Inactive ☐ Active and Inactive

Add New Account

Account Type	Program	Bank	Account #
Note: Some "Deactivate" buttons will remain disabled because the account has a balance greater than zero.			

Add Account

Account Type

Program

Bank

Account Number

Cancel Save

7. Email claims@ihcda.in.gov and report your organization, your award number and state that you have added new IDA THIRD PARTY BANKING information to IHCDALINE. **If you do not report this to IHCDALINE, we will not be able to update our payment system with the new information and will be unable to fulfill Match Claims OR Match Claims will go to the old Holding Account.**

8. Once IHODA receives the email explaining that your banking information has changed, IHODA will update the payment system and future payments will go to the updated banking information.